



# **“BUILDING JUSTICE COMMUNITIES”**

**A CONFERENCE OF  
STATEWIDE PROGRAMS**

February 8-9, 2002  
Indianapolis, Indiana

**REPORT TO THE  
BOARD OF DIRECTORS**

Legal Services Corporation



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***Introduction***

In the summer of 2001, LSC’s State Planning Team determined that there is a critical need to communicate clearly the key elements of planning related to statewide legal services programs. The Team suggested a national initiative to bring together executive directors of statewide programs around the state planning agenda. The goal was to focus executive directors on the fundamentals of planning for client-centered, comprehensive, integrated statewide justice communities. This initiative was specifically designed to bring together executive leadership from newly created statewide LSC-funded programs and the experienced leadership of the more historical statewide programs. This peer group benefited from the opportunity to come together to discuss the challenges and new opportunities created by the processes of state planning.

***Background***

This meeting was originally scheduled for September 13 – 15, 2001, but was postponed in the aftermath of the September 11<sup>th</sup> attack on the U.S.

LSC staff planned and coordinated this conference, and the Corporation sponsored the participation of executive directors by covering their travel costs. Additionally, programs were offered the option of sending additional staff to the conference at their own expense. Amidst a professional and amiable backdrop, the conference was convened at the Marriott Hotel in downtown Indianapolis, Indiana. A total of 31 program representatives attended, and every statewide program was represented with the exception of Idaho, whose executive director and senior management were unable to attend. Also in attendance were representatives from the Puerto Rico, Guam and Virgin Islands programs. Don Saunders attended from the NLADA.

LSC staff in attendance included Randi Youells, Vice President for Programs; Mauricio Vivero, Vice President for Government Relations/Public Affairs; Michael Genz, Director of the Office of Program Performance; Robert Gross, Senior Program Counsel, State Planning Team; Althea Hayward, State Planning Team (Diversity); Melissa Pershing, State Planning Team (who, with input and assistance from OPP staff, prepared and coordinated

the agenda); and assistants Wendy Burnette and Lynn Wilson, who were responsible for conference logistics, registration, and on-site conference assistance.

Indiana Legal Services (ILS) Executive Director Norman Metzger and Colleen Cotter, Director of the ILS Indiana Justice Center, were marvelous hosts. The General Counsel to Indiana's Chief Justice attended Mauricio Vivero's presentation on Public Relations and Friday's lunch. The Chief Justice also testified to the Indiana judiciary's keen interest in and support for Indiana Legal Services and the provision of pro bono by the private bar. On Friday evening, conference participants were joined by the ILS Board, judges, and bar leaders (including the new executive director of the Indiana Bar Foundation) for dinner. The President-Elect of the Indiana State Bar spoke eloquently and at length about her support for legal services and pro bono.

## ***The Conference***

Randi Youells, Vice President for Programs, provided opening and closing remarks for the conference; and an LSC update during lunch. Her timely comments set a tone for open and extensive information sharing and collaboration. A copy of the conference agenda is included with this Report as *Attachment A*.

### **Friday, February 8, 2002**

#### **Session I - Three Statewide Models – A Panel Presentation**

This session provided participants with a snapshot of three statewide programs, and focused on ***“Planning for Client Centered, Comprehensive, Integrated, State-wide Justice Communities.”*** Executive Directors Nan Heald (Maine), Patrick McIntyre (Washington) and Jon Asher (Colorado) spoke from the perspectives of a longtime statewide program (Maine); a state that was reconfigured several years ago (Washington); and, a newly reconfigured statewide (Colorado). Each provided a perspective on developing a vision, setting goals and determining strategies for achieving access to a full range of civil legal services. Each emphasized three central themes:

- 1) The imperative that each state must have a vision that encompasses a full range of services;
- 2) The challenge of orienting existing staff to a new or changing vision, inculcating the vision and mission within the staff, and, uniting staff (old and new) over a common vision, whether in a single office or scattered office setting; and,
- 3) The challenge of balancing vision with fiscal reality, recognizing that as funds remain static or decline, the need for collaboration increases and, at the same time, the threat of fractionalization increases.

## *Session II - Group Discussion*

A group discussion, facilitated by Robert Gross and Melissa Pershing, followed. The discussion provided a forum for participants to share thoughts, challenges and best practices in the context of developing and fostering a statewide vision.

Participants suggested that statewide program leadership needed to be able to:

- Talk consistently and constantly about vision and quality;
- Set high expectations for staff;
- Delegate appropriate management functions so that the Executive Director can be a visible leader among staff and the greater equal justice community;
- Work closely with the state court system, and get involved in collaborations;
- Build on the program strengths that already exist;
- Seek assistance from experienced consultants;
- Visualize state planning holistically;
- Know that there are positive long-term advantages that ensue from the state planning initiative;
- Perform environmental scans for information vital to the creation of a statewide vision;
- Appreciate and respect the differences in office and staff culture and use them as a genesis for a unified vision;
- Think critically about how to unify systems—noting that sometimes uniformity is necessary, and sometimes it is not appropriate;
- Understand that the pursuit of justice is different from the pursuit of access to justice.

## *Session III - Press & Public Relations*

Mauricio Vivero, Vice President of Governmental Affairs/Public Relations, presented a session that focused on how programs can develop effective public relations campaigns. Focusing on the findings of the national Russenello research, Mr. Vivero encouraged participants to use the media to publicize meaningful program events. He stressed the importance of getting the right message out, delivered by the most credible and

prominent spokesperson(s). Participants formed small discussion groups and brainstormed about events or ideas that could form the basis for a program's media campaign.

***Identified Challenges and Opportunities:***

- The concept of legal aid is widely supported across a majority of people of different ideologies and politics.
- People do not know what we do; we have little or no name recognition.
- Merger, state planning and technology grants provide news opportunities.

On Friday afternoon, the conference agenda consisted of thematic discussions or mini-sessions that provided an exposition of the state planning concept, entitled, *"Breaking the Concept into Parts - Client-Centered, Comprehensive, Integrated, Statewide."*

**Session IV - Client Centered**

This discussion was co-facilitated by Colleen Cotter (Indiana Legal Services) and Robert Gross (LSC) and focused on the challenges of creating a service delivery model that is client-centered through client leadership in the state planning process and through client involvement on boards of directors.

***Identified Challenges and Opportunities:***

- The collective information we glean from intake does not necessarily equate to client needs, or priorities of need, generally. Only the people who can find us, call us.
- Make sure clients have training, support, mentoring, and leadership opportunities for board or committee work, planning, and other activities.
- Create efforts to train client leaders in substantive areas so that information can flow into the community.
- Examine whether means testing should still be a part of the regulations and whether it impacts the caliber of client leadership.

### Session V - Comprehensive

Marilyn McNamara (New Hampshire) and Adrienne Worthy (West Virginia) facilitated this discussion. It provided a forum for sharing how programs can build bridges with other equal justice providers and explored the need for creativity in forming partnerships and collaborations that may consist of unusual associations.

#### *Identified Challenges and Opportunities:*

- Build bridges with other providers and agencies through professional involvement at the staff level on committees and boards, as well as collegial support and exchange, both personal and professional. Shared activities could include community education, staff training, and intake training.
- Develop an intentional network with individuals and groups that share concerns with us (such as homelessness) and build on those relationships by working together to come up with common strategies that address substantive issues.
- In keeping with goals developed from needs assessments and inclusive planning, reduce reliance on IOLTA funding so funds can be redirected to new groups and/or to help existing non-LSC groups get stronger.
- Broaden the coalition, even though it means struggling with group dynamics, resistance to "sharing the halo," and addressing concerns about quality in programs over which we have no control. Some programs and places see resistance from staff: *Why should "we" share our work with "them?"* (brief and forms sharing).
- Cooperative extension networks and community colleges are valuable for rural service delivery.
- Know when a planning group has reached critical mass.
- Make sure the bar and the judiciary share the broader vision.

### Session VI - Integrated

Anne Milne (Utah) and Roger McCollister (Kansas) facilitated this discussion on innovative ways to integrate and combine fundraising to produce a creative resource development program.

***Identified Challenges and Opportunities:***

- Invest time in educating other stakeholders and funders about the statewide program, and what it means in terms of infrastructure and presence.
- Maintain close ties with branch offices.
- The use of unbundled legal services (unbundled rule in WY) makes attorneys more visible to the private bar, and, therefore, makes a statement about client need.
- Two recent Indiana Supreme Court cases establish a right of indigent persons to be represented in civil cases.
- Money raised locally for local purposes needs to stay local.

**VII - Statewide**

Norman Metzger (Indiana) and Janet Millard (Wyoming) facilitated this session, which included defining the term “statewide” and discussion of various statewide program models. The session also examined the impact of planning and creation of a vision on pro bono involvement, leveraging human resources, and related service delivery issues.

***Identified Challenges and Opportunities:***

- Combined fundraising campaign means creating an integrated approach to funders.
- Help find grants for non-LSC programs or for those who may not necessarily have been directly involved in the planning process. We have the experience in researching, writing, and monitoring grants that many other, smaller players do not.
- Funders do not want to hear about problems. They want to know what will be done to solve problems and address issues. There must be evidence that services to be funded meet the civil legal challenges faced by the community.
- Does this approach dilute this legal services mission?

**Saturday, February 9, 2002**

**VIII - Technology**

Rhonda Lipkin (Maryland), Victor Geminiani (Hawaii), Nan Heald (Maine) and Mike Genz (LSC) presented this session.

- 1) **Maryland Legal Assistance Network (MLAN)** – Rhonda Lipkin provided a demonstration of [www.peoples-law.org](http://www.peoples-law.org) and [www.Mdjustice.org](http://www.Mdjustice.org), which is designed to be a virtual library.
- 2) **Hawaii** - Victor Geminiani demonstrated how video conferencing is being used extensively by staff and clients to serve six islands. A hotline is the gateway to a self help center offering court forms, a web page, 120 self-help packets, phone advice, clinics, and outcomes follow-up.
- 3) **Maine** - Nan Heald provided a demonstration of [www.helpmelaw.org](http://www.helpmelaw.org) with smart search capability and [www.ptla.org](http://www.ptla.org), the Pine Tree Legal Assistance site. All client leadership in Maine has email. They found volunteers who will translate documents for free at [www.volunteermatch.org](http://www.volunteermatch.org).
- 4) **LSC** – Michael Genz provided an overview of LSC’s technology efforts: 1) The TIG (Technology Initiative Grants) program is developing templates for statewide websites. Indiana is studying document assembly software, and Illinois is studying the combination of audio-video conferencing with document assembly. 2) Shared National TIG grants include the National Technical Assistance Project (NTAP), creation of [www.lstech.org](http://www.lstech.org), and development of measurement and evaluation tools, [www.legalmeetings.org](http://www.legalmeetings.org). 3) Mr. Genz announced the deadlines for this year’s TIG Requests For Proposals.

*Identified Challenges and Opportunities:*

- Do not hesitate and do not skimp on hiring a professional technology person. This is not a luxury – expensive mistakes will be made otherwise.
- Videoconferencing has “revolutionized” the programs using it for staff and clients.
- Clients do NOT have problems with videoconferencing.
- Do not forget annual maintenance costs and staff training in your technology budgets.

## *IX - Diversity*

Co-facilitated by Teresa Cosby (South Carolina) and Althea Hayward (LSC), this discussion focused on the importance of embracing cultural diversity, leadership succession planning, and the general expansion of program leadership, especially as a part of a state planning initiative.

### *Identified Challenges and Opportunities:*

- Should governing bodies reflect the cultural diversity of the service area?
- Demographics show that at the staff level, the largest proportion of staff are (in order from largest to smallest): married Caucasian women, married African American women, Caucasian males, African American males, single white females, single African American females. Caucasian males, however, are the largest group of CEO's or Executive Directors in legal services.
- To encourage diversity: Recruit outside your community, increase base pay, have a loan repayment plan. Diverse leadership attracts diverse staff. Diversity will be enhanced through the personal commitment of time by executive leadership to mentor future leaders, and by private bar recruitment of minority lawyers into the state.
- Why do we have to specifically include diversity in state planning, why can't we just "let it happen" or deal with it informally?
- Bring the Reggie fellowships back.
- NAPIL has an extensive manual of loan repayment plans. An NLADA civil policy group is surveying loan repayment plans. Note: LSC President John Erlenborn is a member of the ABA Commission on Loan Repayment Plans.

### *Transformation: An Overarching Achievement Identified*

It was obvious from the remarks made by a number of recently merged states that some kind of critical phase had been passed. Participants recognized that programs were turning or had turned that critical corner--from being resistant to or resentful of change to an embracing of new visions by staff, board members and other stakeholders. Participants shared experiences about these transformations and acknowledged the benefits of reconfiguration, as programs complete the critical work of reorganization.

## *The Future*

Participants have already been provided detailed contact information so that they can network and follow-up with others who attended the conference. LSC asked attendees to identify what they feel would be the next appropriate steps. A report of the conference will also be provided to all participants complete with a package containing handouts. This information will also be shared with LSC's OPP staff.

A total of 14 completed evaluations were received from participants. All were unanimous in their praise and appreciation for the statewide conference, and expressed a desire for an annual or semi-annual conference of this nature to be held either in person or with the use of videoconferencing. Several suggested that separate break-out sessions could be developed for long-time statewides and recently merged statewides, which would allow more time, attention and specifically tailored agendas and discussions for both. It was also noted that not all programs were "state"wides and that perhaps there would be value in getting the island programs together (Hawaii, Puerto Rico, the Virgin Islands, Micronesia and Guam) since they face similar delivery issues.

- *Ideas from both attendees and staff for additional follow-up included:*
  - i. Regional leadership conferences – small intense retreat-like group meetings of Executive Directors plus 1 or 2 identified potential leaders from each of the programs in the region facilitated by professionals on leadership/management in non-profits/legal services;
  - ii. development of a Listserv for leaders in statewide programs;
  - iii. Password-protected directors' bulletin board, similar to RIN;
  - iv. Mentoring/exchange program for newer leaders or leaders who could benefit from exposure to other programs;
  - v. Online leadership clearinghouse with links to non-profit management and leadership sites and materials, M.I.E. etc.
  - vi. Resources, protocols and guidelines for conducting meaningful statewide needs assessment;
  - vii. More regional meetings and meetings of "like" programs, i.e., rural with rural, or small with small – for mutual problem solving;
  - viii. Directory of statewide programs that includes information such as number of employees, number of offices, amount/percentage/type of funding, level of tech usage, types of services, collaborations/partnerships, etc. that would allow us to look for a comparable program to brainstorm a particular issue;
  - ix. A place to share materials, information and best practices documents, orientation packages, training ideas.

Many attendees also asked for additional information on the following topics:

- Technology; technology innovations; technology connecting state government, courts, agencies and programs; technology as a means of outreach; technology use between programs/offices.
- Resource development/fundraising ideas.
- Public relations initiatives.
- Internal/staff communications.
- Ways to establish and maintain a statewide equal access committee.

Final comments (from one participant's evaluation):

*“The real challenge in legal services today is how to change and expand our mission through new and innovative approaches to the poverty around us. I feel this can be done within the current LSC restrictions but it requires entirely new approaches and combinations of services. I would encourage an agenda that challenges us to change and expand our mission. Change is good.”*